**CAPPS HR/PAYROLL
End-User Training (EUT)**

EUT Course - 190

Performance Management for Employees

PeopleSoft 9.2

November, 2017 (revised)

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Performance Management for Employees

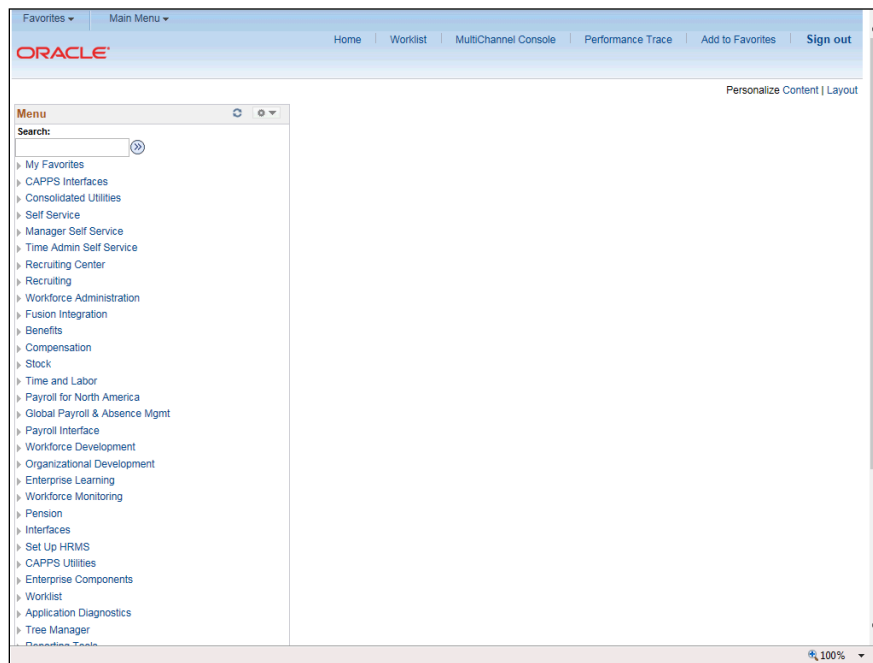## Section 2 - Employee Performance Process Steps

Reviewing Defined Criteria for Long Document

Section 2, Lesson 1 Exercise - Scenario: Reviewing Defined Criteria for Long Document

Procedure

In this lesson you will learn how to review defined criteria on a Statewide Long Document.

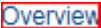| Step	Action
1.	**Note**: The CAPPS HR/Payroll Dashboard (home page) that you see here is for training purposes only and may display more functionality (menus) than you will see in your environment. The view of your home page will vary according to your role.

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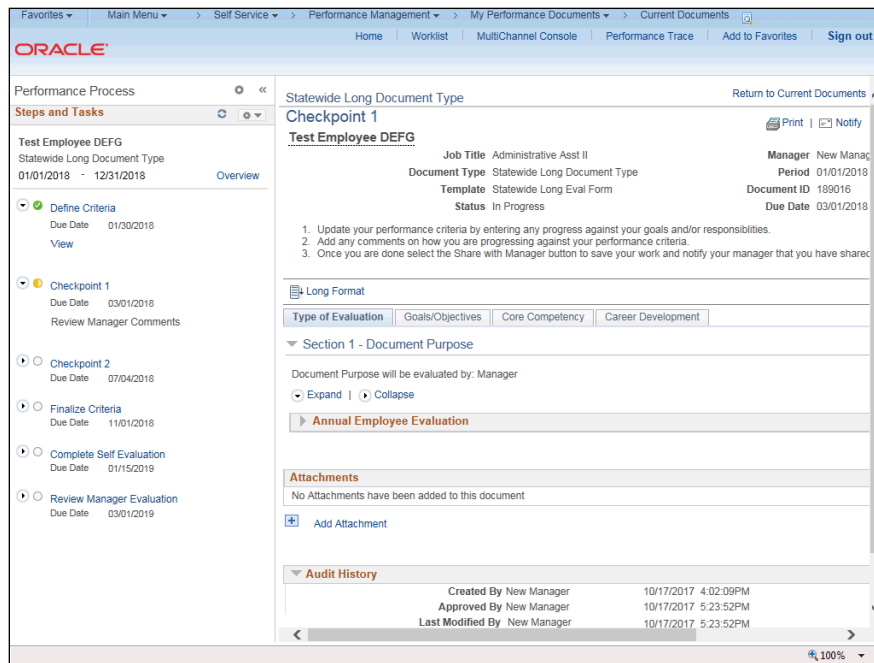| Step	Action
2.	Click the **Self Service** link. ▶ Self Service
3.	All of the Performance Management tasks will be conducted within the **Performance Management** Module. Click the **Performance Management** link. Performance Management
4.	Within the Performance Management Module, there is a folder for **Performance Documents.**
5.	The **Other's Performance Documents** folder is where you will find requests from managers nominating you to participate in providing feedback to another employee's performance evaluation.
6.	This is also where you will complete the participant evaluation (Competency section) and review historical participant evaluations that you have completed.
7.	Click the **My Performance Documents** link. My Performance Documents
8.	Within the **My Performance Documents** folder, there are links for documents that need to be **Created (not used for Employees),** have been created (**Current**), and are Complete (**Historical**).
9.	Click the **Current Documents** link. Current Documents
10.	This page lists the **Current Performance Documents** for you. There will normally be one document listed on the Current Performance Documents page that will indicate the **Document Status** and **Period Dates**.
11.	Agencies will have various names for the Performance Documents. In training, we will use either the **Statewide Long** or **Short Document Types**.
12.	**Reviewing Defined Criteria** is not a required step therefore some agencies may or may not require their employees to review. The next step in the process is Checkpoint 1 (if applicable) that is why you see it listed as the Document Status.
13.	Click the **Statewide Long Document Type** link. Statewide Long Document Type
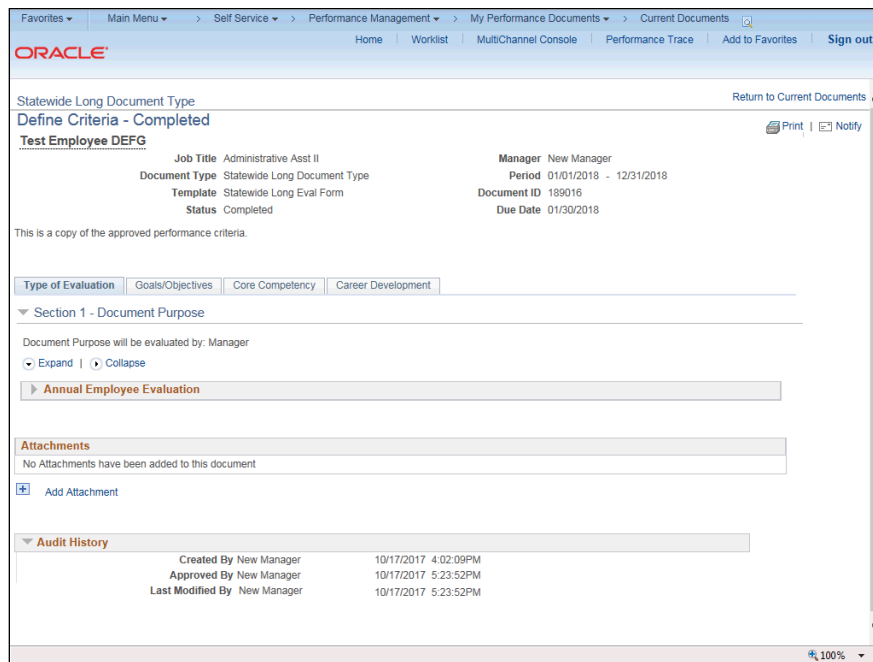
Step	Action
14.	Let's review this page by sections. To the left is the **Activity Guide** which tells you where you are within the Performance Management Process. Depending upon your business process(es), you may or may not complete every single step/task.
15.	You will notice that there is a green icon next to **Define Criteria.** This means that this step is Complete. The Define Criteria step was completed by the manager and now you can review what they completed.
16.	Yellow means this step is waiting to be completed as in the Checkpoint 1 listed.
17.	There are due dates within the steps. They serve as a guide for the Manager to complete the steps in the process.
18.	Managers have 30 days to complete **Define Criteria**.
19.	**Checkpoint 1** due dates are 305 days before Period End Date. (Completing Checkpoints are optional).
20.	**Checkpoint 2** is 180 days before Period End Date.
21.	**Finalize Criteria** is 60 days before the Period End date.
22.	**Complete Self Evaluation** and **Review Manager Evaluation** are the last steps for the Employee to complete**.** The due dates are 15 days after the Period End Date.
23.	Click the **Overview** link. Overview
24.	The Overview page provides details on the Performance Process Steps. Keep in mind that it all depends on your agency's business processes if certain steps will be performed or not.
25.	Click the **More Details** link. More Details
26.	Click the **Close** link. ×

Step	Action
27.	You may need to minimize the **Activity Guide** to review the Statewide Document on the right. Click the **Minimize Performance Process** button. «
28.	To bring the **Activity Guide** back, Click the **Expand** button. »
29.	To see details for the Defined Criteria step you must expand this step. Click the **Expand Sub Steps** button. ▶

Step	Action
30.	To view the Statewide Long Document Type with the defined criteria more easily you will use the **View** option. Click the **View** link. View
31.	The top portion of the page states the **Define Criteria - Completed** because you are viewing the defined criteria that was completed by the manager. This section also includes details regarding this evaluation.
32.	The print icon allows you to view and print the document in a pdf format.
33.	The bottom half of the page contains **Evaluation Tabs** with defined criteria for your review.
34.	The current tab is on **Type of Evaluation**. This tells you the Document Purpose. This particular document is for an **Annual Employee Evaluation**.
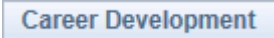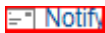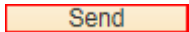
Step	Action
35.	Click the **Goals/Objectives** tab. Goals/Objectives

Step	Action
36.	The **Goals/Objectives** are collapsed so you will expand them in order to few all of the details at once. Click the **Expand** link. ▼ Expand
37.	You will review every **Goal,** the descriptions, and any other information that has been entered.
38.	Click the scrollbar.
39.	Review **Goals** and **Descriptions** for Goals 2, 3 and 4.
40.	Click the scrollbar.
41.	Click the **Core Competency** tab. Core Competency
42.	Click the **Expand** link. ▼ Expand
43.	Review all of the **Competencies** and the **descriptions**.
44.	Click the scrollbar.
45.	Continue reviewing the **Competencies** and **descriptions**.
46.	Click the scrollbar.
47.	Click the **Career Development** tab. Career Development
48.	Click the **Expand** link. ▼ Expand
49.	Review the **Employee Career Development Area** and any descriptions and comments.
50.	Click the scrollbar.
51.	Click the scrollbar.
52.	**Note: Goals/Objectives** and **Career Development** can be added/deleted/edited throughout the entire Performance Management process. Based on discussions and performance, the manager may make changes in these areas.
53.	**Competencies** can be added/deleted/edited up until the manager completes the **Finalize Criteria** step. After that, no additional changes can be made to competencies.

Step	Action
54.	Reviewing defined criteria is not a requirement for an employee unless the manager requests, therefore there is no action for you to perform in the system. However, there is a notify button that you can use to send an email to your manager informing them that you have reviewed per their request. Click the **Notify** link. Notify
55.	Enter the desired information into the **To** field. Enter "**manageremail@texas.gov**". To
56.	Enter the desired information into the **Message Text** field. Enter "**I have reviewed the defined criteria per your request.**". Message Text
57.	Click the **Send** button. Send
58.	Click the **Home** link. Home
59.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Reviewing Checkpoint Feedback

Section 2, Lesson 2 Exercise - Scenario: Reviewing Checkpoint Feedback

Procedure

In this lesson you will learn how to review Checkpoint feedback, if applicable.
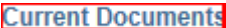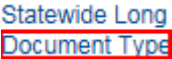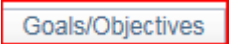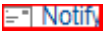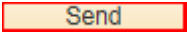
Step	Action
1.	Click the **Self Service** link. Self Service

Step	Action
2.	Click the **Performance Management** link. Performance Management
3.	Click the **Current Documents** link. Current Documents
4.	Click the **Current Documents** link. Current Documents
5.	Click the **Statewide Long Document Type** link. Statewide Long Document Type
6.	You are about to review the **Checkpoint 1 feedback** provided by your manager. Checkpoints are status updates within the evaluation period where a manager has identified where an employee stands with the assigned Goals/Objectives, Competencies and Employee Development for their position.
7.	Click the **Minimize Performance Process** button. «
8.	Click the **Goals/Objectives** tab. Goals/Objectives
9.	Click the **Expand** link. ▾ Expand
10.	You will review the **Status** and **Manager Comments** for each **Goal** assigned.
11.	Click the **Scroll bar**.
12.	The manager may have added their comments in the **Goals & Objectives Summary** text box.
13.	Click the **Scroll bar**.
14.	Click the **Scroll bar**.
15.	Click the **Core Competency** tab. Core Competency
16.	For **Competencies,** there are no status updates within a Check Point. Although managers may include comments for the Competency summary. The manager can also add and delete competencies throughout the year prior to them finalizing criteria.

Step	Action
17.	Click the **Career Development** tab. Career Development
18.	Click the **Expand** link. Expand
19.	The manager has indicated PMP certification as an area planned for development. Review the Manager Comments for this area.
20.	Click the **Scroll bar**.
21.	The manager did not make any updates to the Development section and there are no comments.
22.	Click the **Scroll bar**.
23.	You have reviewed the Checkpoint 1 feedback and will notify the manager. Click the **Notify** link. Notify
24.	Enter the desired information into the **To** field. Enter "**manageremail@texas.gov**". To
25.	Enter the desired information into the **Message Text** field. Enter "**I have reviewed the Checkpoint Feedback.**". Message Text
26.	Click the **Send** button. Send
27.	Click the **Home** link. Home
28.	Congratulations! You have completed this lesson. **End of Procedure.**

Completing Self-Evaluation

Section 2, Lesson 3 Exercise - Scenario: Completing Self-Evaluation

Procedure

In this lesson, you will learn how to complete an employee self evaluation upon request by your manager.

Step	Action
1.	Click the **Self Service** link. Self Service

Step	Action
2.	Click the **Performance Management** link. Performance Management
3.	Click the **Current Documents** link. Current Documents
4.	This page lists the current document where you will need to complete your self-evaluation with a status of Evaluation in Progress.
5.	Click the **Statewide Long Document Type** link. Statewide Long Document Type
6.	You are on the **Update and Complete Self Evaluation** step.
7.	Click the **Minimize Performance Process** button. «
8.	You will go through each of the **Evaluation Tabs** and enter information accordingly. There will be **ratings** to select and comment boxes for **Goals** and **Competencies**.
9.	Click the **Expand** link. Expand
10.	Click the **Scroll bar**.

Step	Action
11.	Click the **Employee Rating** list.

Employee Rating [▼]

Step	Action
12.	Click the **4- Exceeds Expectations** list item.

4- Exceeds Expectations

Step	Action
13.	Click the **Employee Rating** list.

Step	Action
14.	Click the **4- Exceeds Expectations** list item.
	4- Exceeds Expectations

Step	Action
15.	Click the **Scroll bar**.
16.	Click the **Employee Rating** list.
	Employee Rating

Step	Action
17.	Click the **3- Meets Expectations** list item.
	3- Meets Expectations

Step	Action
18.	Enter the desired information into the field. Enter "**I am making great progress toward meeting and exceeding the assigned goals/objectives.**".
19.	Click the **Spell Check Comments (Alt+5)** button.
20.	Click the **OK** button.
21.	Click the **Scroll bar**.
22.	Click the **Core Competency** tab.
23.	Click the **Expand** link.
24.	Click the **Employee Rating** list. Employee Rating

Step	Action
25.	Click the **4- Exceeds Expectations** list item. 4- Exceeds Expectations

Step	Action
26.	Click the scrollbar.
27.	Click the **Employee Rating** list. Employee Rating

Step	Action
28.	Click the **4- Exceeds Expectations** list item. 4- Exceeds Expectations

| Step	Action
29.	Click the **Employee Rating** list.

Employee Rating [⌄]

Step	Action
30.	Click the **4- Exceeds Expectations** list item.

4- Exceeds Expectations

Step	Action
31.	Click the scrollbar.
32.	Enter the desired information into the field. Enter "**I am exceeding all of the Competencies that relate to my position.**".
33.	Click the **Spell Check Comments (Alt+5)** button.
34.	Click the **OK** button.
35.	Click the scrollbar.
36.	Click the scrollbar.
37.	Click the **Save** button.
38.	Click the **Overall Summary** tab.
39.	No entries to make on the Overall Summary tab. Click the **Career Development** tab.

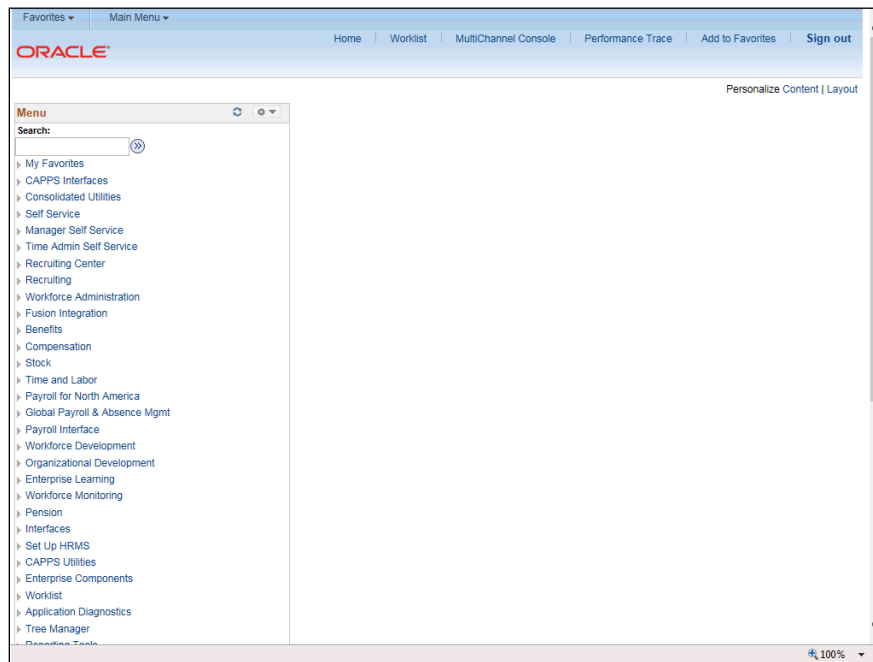| Step	Action
40.	Click the **Expand** link. ▾ Expand
41.	Click the scrollbar.
42.	Enter the desired information into the field. Enter "**I have submitted the dates that the PMP certification courses are offered and am awaiting an approval.**".
43.	Click the **Save** button. Save
44.	Click the **Job Description** tab. Job Description
45.	Click the **Expand** link. ▾ Expand
46.	Click the **Yes** option. ○ Yes
47.	Click the scrollbar.
48.	Click the **No** option. ○ No
49.	Click the **Save** button. Save
50.	You will select the Complete button once you are all done and want the manager to be notified. Click the **Complete** button. Complete
51.	Click the **Confirm** button. Confirm
52.	Click the **Home** link. Home
53.	Congratulations! You have completed this lesson. **End of Procedure.**

Accepting/Completing Participant Evaluation

Section 2, Lesson 4 Exercise - Scenario 1: Accepting/Completing Participant Evaluation

Procedure

In this lesson you will learn how to accept a nominee request and complete a Participant evaluation for the designated employee.

Step	Action
1.	When you are nominated to participate in the evaluation of an employee, you will receive an auto-generated email request similar to this one. Within the email, you can select the **URL** and it will take you to the log in screen otherwise you can navigate there.

Step	Action
2.	Click the **Self Service** link. Self Service
3.	Click the **Performance Management** link. Performance Management

Step	Action
4.	**Other's Performance Document** folder is where you will always go to respond to a nominee request to participate, complete the other employee's evaluation, and to review historical evaluations that you have completed for others. Click the **Other's Performance Documents** link. Other's Performance Documents
5.	Click the **Pending Evaluation Requests** link. Pending Evaluation Requests
6.	If you were nominated for multiple employees those requests would be listed here. The manager has the ability to delete their request whereby it will be removed from the list.
7.	Click the **Test Employee DEFG** option. ☐ Test Employee DEFG
8.	When you **Accept** or **Deny** the participant request, your response will automatically be sent via email to the manager.
9.	Click the **Accept** button. Accept
10.	After your acceptance, the manager receives an email indicating that you have accepted the request to participate as a Nominee. You can either come back to complete the employee evaluation or complete the evaluation now.
11.	In training, you will go ahead and complete the evaluation. Click the **Test Employee DEFG** link. Test Employee DEFG
12.	Notice that the **Role** says Peer at the top of this document.
13.	As a Participant (nominee)**,** you are completing the **Competencies** section of the evaluation for the designated employee. The employee will not see your participant evaluation only the manager can see it.
14.	Click the **Expand** link. ▾ Expand
15.	Review each **Competency** and the description and then enter a Rating.
16.	Click the **Rating** list. Rating [⌄]

Step	Action
17.	Click the **4- Exceeds Expectations** list item. 4- Exceeds Expectations

Step	Action
18.	Click the **Scroll bar**.
19.	Click the **Rating** list.

Step	Action
20.	Click the **3- Meets Expectations** list item. 3- Meets Expectations

Step	Action
21.	Click the **Scroll bar**.
22.	Click the **Rating** list.

Rating [⌄]

Step	Action
23.	Click the **3- Meets Expectations** list item.

3- Meets Expectations

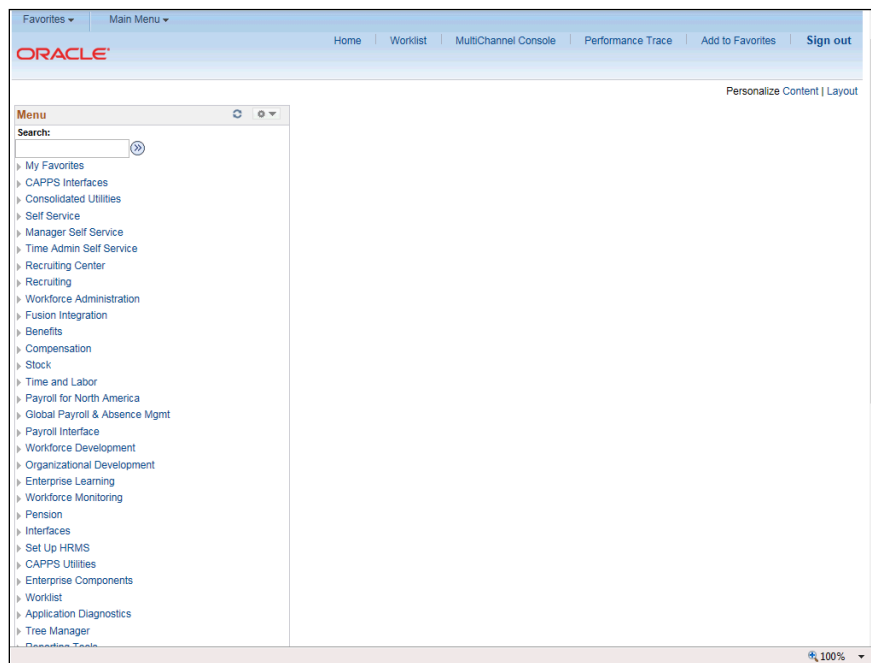| Step	Action
24.	Enter the desired information into the field. Enter "**This employee is doing well enough to meet expectations.**".
25.	Click the scrollbar.
26.	You have an option to save what you have entered so far and come back to complete your evaluation. Click the **Save** button. Save
27.	You have completed everything and want to move your evaluation forward to the manager. Click the **Complete** button. Complete
28.	Click the **Confirm** button. Confirm
29.	The manager receives an email indicating that you have completed the Participant Evaluation. They can review what you have entered.

Step	Action
30.	Click the **Home** link. Home
31.	Congratulations! You have completed this lesson. **End of Procedure.**

Declining the Participant Request

Section 2, Lesson 4 Exercise - Scenario 2: Declining the Participant Request

Procedure

In this lesson you will learn how to decline a request to participate as a nominee.

Step	Action
1.	Click the **Self Service** link. ▶ Self Service
2.	Click the **Other's Performance Documents** link. Other's Performance Documents
3.	Click the **Pending Evaluation Requests** link. Pending Evaluation Requests

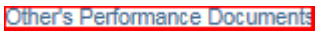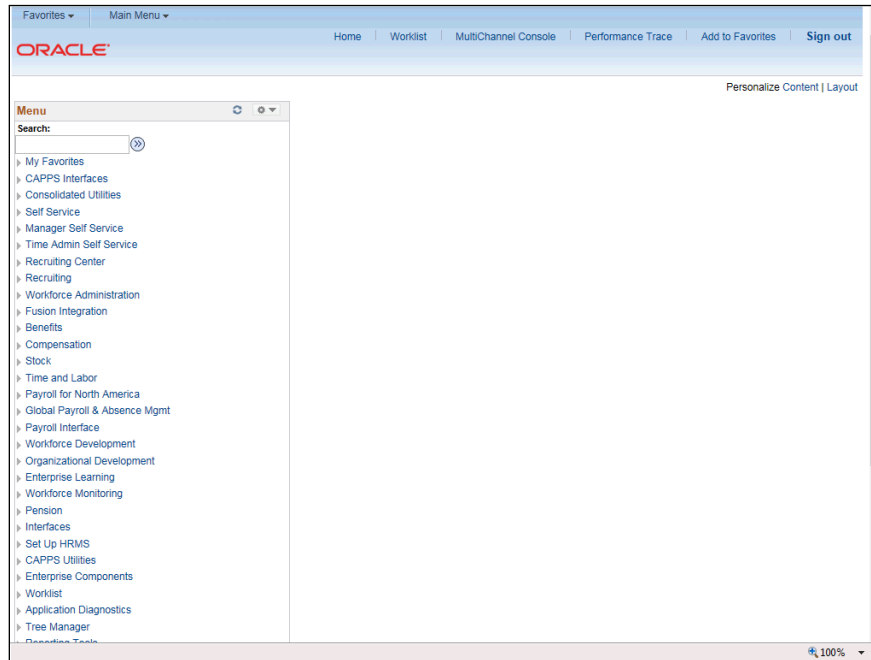| Step	Action
4.	Click the **Test Employee DEFG** option. ☐ Test Employee DEFG
5.	When you **Accept** or **Decline** the participant request, the system will send your response via email to the manager.
6.	Click the **Decline** button. Decline
7.	You can enter comments although they are not required. Enter the desired information into the **Enter Comments** field. Enter "**I'm not familiar enough to be able to evaluate this employee.**". **Enter Comments:**
8.	Notice the red text above, Are you sure you want to decline this evaluation request? Click the **Yes** button. Yes
9.	Click the **Home** link. Home
10.	Congratulations! You have completed this lesson. **End of Procedure.**

Reviewing Employee Final Evaluation

Section 2, Lesson 5 Exercise - Scenario: Reviewing Final Employee Evaluation
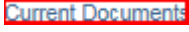
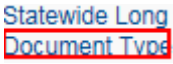**Procedure**

In this lesson you will learn how to review the final employee evaluation and include comments.

Step	Action
1.	Click the **Self Service** link. ▸ Self Service
2.	Click the **Performance Management** link. Performance Management
3.	Click the **Current Documents** link. Current Documents
4.	Click the **Statewide Long Document Type** link. Statewide Long Document Type
5.	Click the **Minimize Performance Process** button. «
6.	You should review the Manager Ratings and any comments entered on all of the **Evaluation Tabs**.

Step	Action
7.	Click the **Expand** link. Expand

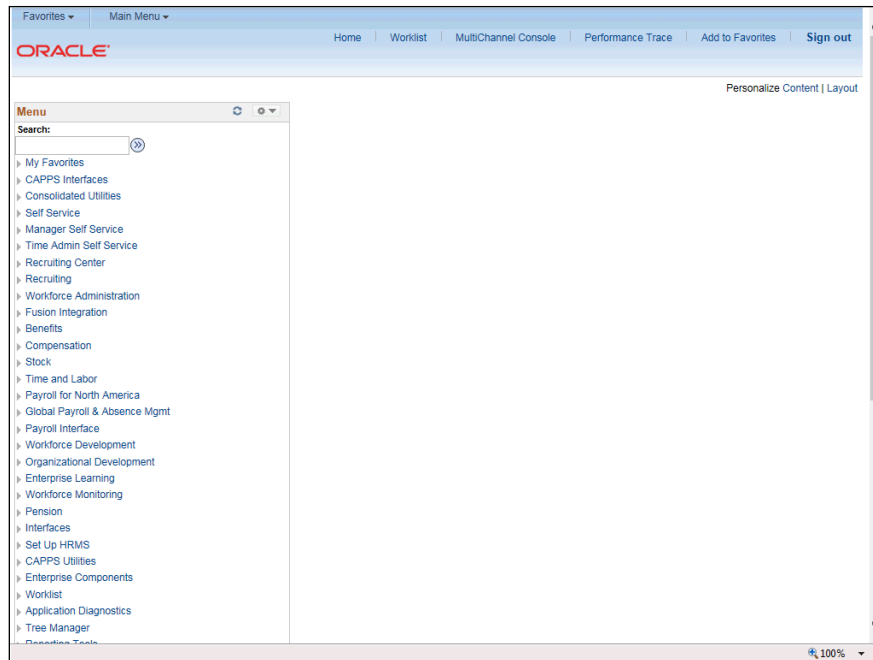| Step	Action
8.	Click the **scrollbar**.
9.	Continue reviewing **Goals.** Click the **scrollbar**.
10.	The manager has entered comments in the Goals Summary section. Click the **scrollbar**.
11.	Click the **Core Competency** tab. Core Competency
12.	Click the **Expand** link. Expand
13.	Continue with reviewing the **Competency Manager Ratings** and **Comments**. Click the **scrollbar**.
14.	Click the **scrollbar**.
15.	Click the **scrollbar**.
16.	Click the **Overall Summary** tab. Overall Summary
17.	The **Overall Summary** page provides an average of all the ratings entered. The Manager may have added **Comments** within this section as well.
18.	Click the **Career Development** tab. Career Development
19.	Click the **scrollbar**.
20.	Click the scrollbar.
21.	Click the **Job Description** tab. Job Description
22.	You may enter your comments regarding the employee final evaluation. Click the **Employee Comments** link. Employee Comments
23.	Enter the desired information into the field. Enter "**Thank you for the positive employee performance evaluation.**".

Step	Action
24.	Click the **Save** button. Save
25.	Click the **Home** link. Home
26.	Congratulations! You have completed this lesson. **End of Procedure.**

Acknowledging Evaluation

Section 2, Lesson 6 Exercise - Scenario: Acknowledging Evaluation

Procedure

In this lesson you will learn how to Acknowledge a performance evaluation upon request from your manager.

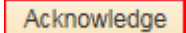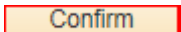| Step	Action
1.	Click the **Self Service** link. ▸ Self Service
2.	Click the **Performance Management** link. Performance Management

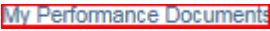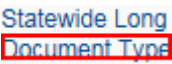| Step	Action
3.	Click the **My Performance Documents** link. My Performance Documents
4.	Click the **Current Documents** link. Current Documents
5.	Click the **Statewide Long Document Type** link. Statewide Long Document Type
6.	Notice where you are in the process. Highlighted in yellow is what needs to occur - Employee Acknowledgement.
7.	Click the **Minimize Performance Process** button. «
8.	Click the **Acknowledge** button. Acknowledge
9.	Click the **Confirm** button. Confirm
10.	The manager will receive an automated email indicating that the document has been acknowledged by you. In the case you are absent or refuse to acknowledge, the manager can override the acknowledgement and complete the evaluation process.
11.	Click the **Home** link. Home
12.	Congratulations! You have completed this lesson. **End of Procedure.**

Viewing/Printing Historical Documents

Section 2, Lesson 7 Exercise - Scenario: Viewing/Printing Historical Documents

Procedure

In this lesson you will learn how to view, print, save your completed employee performance evaluation.

Step	Action
1.	Click the **Self Service** link. ▷ Self Service
2.	Click the **My Performance Documents** link. My Performance Documents
3.	Once an evaluation is completed, it will be located under Historical Documents. Click the **Historical Documents** link. Historical Documents
4.	Click the **Statewide Long Document Type** link. Statewide Long Document Type
5.	Click the **Minimize Performance Process** button. «
6.	Click the **Print** link. 🖨 Print

Step	Action
7.	Using this tool bar, you can either **Save, Print,** and/or **View.** Click the **Next Page** object.
8.	Click the **Next Page** object.
9.	Click the **Next Page** object.
10.	Click the **Next Page** object.
11.	Click the **Next Page** object.
12.	The eSignature section displays your signature once you acknowledge the evaluation.
13.	When a manager overrides the acknowledgement, their name appears in the Employee Signature section with (Manager Override) indicated.

Step	Action
14.	Click the **scrollbar**.
15.	Click the **scrollbar**.
16.	Click the **Close** button.

Step	Action
17.	Click the **Close current tab** button.

Step	Action
18.	Click the **Home** link. Home
19.	Congratulations! You have completed this lesson. **End of Procedure.**